ADDENDUM 1

Date: August 5, 2016

Project: Call Recording System

RFP: UTP-CRS

To: Prospective Proposers

This Addendum 1 forms part of and modifies the Request for Proposal UTP-CRS (RFP) issued July 15, 2016 with amendments and additions noted below.

**General Questions**

1. Can vendors outside the US submit a proposal (i.e. India, Canada)?

Answer: All companies that meet UTP’s minimum requirements may submit a proposal; however, contractor will not (i) transfer UTP Data outside the borders of the United States or (ii) permit remote access to UTP Data by any individual or entity outside the United States. The foregoing shall not be deemed to prohibit Contractor from engaging in software development activities from locations, or using employees, subcontractors and/or agents, situated outside the United States.

1. Will selected vendor need to attend meetings in the Houston area?

Answer: If selected, face to face meetings would be required.

1. Can tasks related to the RFP be performed outside the US (i.e. India, Canada)?

Answer: Please see #1

1. Can proposals be submitted via email?

Answer: One copy may be submitted via email; 10 hard copies are required per section 3.1 of the RFP.

1. Where are the agents located?

Answer: Call center is located at 6414 Fannin St., Suite G125, Houston, TX 77030; Nurse Triage is located at 1200 Binz St., Houston, TX 77004; the clinics are located at multiple sites throughout the greater Houston area.

1. What kind of phones do the agents use?

Answer: Avaya 9641G – VoIP phone

1. Where are the trunks for the agents? Centralized or going to each gateway?

Answer: centralized; currently at 7000 Fannin St., Houston, TX 77030

1. Is there an existing AES server selected vendor can use?

Answer: No

1. What does “cloud hosted” mean? Can we do an on-site hosted?

Answer: Successful vendor will Host system - not on UTP’s site.

1. Please verify that the base proposal will be for 85 users and that the optional configuration including the clinics should be 285.

Answer: UTP would like to see price break outs for various levels from 100-400. Please see #40

1. Please provide a description of the current DR configuration of the Communication Manager/Elite.

Answer: Currently not in place.

1. What % of calls does UTP want screen capture on?

Answer: UTP is not interested in screen capture at this time.

1. Does UTP need 6 month retention on screen capture (to match the 6 month retention on the recording)?

Answer: UTP is not interested in screen capture at this time.

1. Would like to confirm that the quote should be based upon:
   1. Recording 85 agents (60 call center and 25 nurse triage), with incremental costs for 40 (call center additional agents) and 5 (nurse triage 20% growth).

Answer: Please see #10

* 1. Confirm that there should be a separate line item to include 20 recorded agents for the UTP clinics across 50 sites?

Answer: Please see #10

1. What version of the AES is available?

Answer: None

1. What version of CMS is being used for reporting?

Answer: R16.3

1. Clarification around PCI compliance – If automated data redaction is required: In order to quote automated trigger points, what access can be granted to the application(s) being used to input credit card payments?

Answer: Credit card payments are currently off our network – third party machines are in place.

1. From a DR perspective, is this expected to be included as part of the quote, or should proposer just document the options for DR capabilities?

Answer: Provide as part of the quote.

1. Is it UTP’s desire to have redundant MPLS connections to the cloud service?

Answer: yes

1. Does UTP currently have any High Availability with any of the Avaya systems? If so, what systems are HA?

Answer: Yes, Call manager, SBC’s Session Managers

1. Does UTP currently have any redundancy with any of the Avaya systems? If so, what systems are redundant?

Answer: No

1. Please describe current Disaster Recovery architecture, including components installed specifically designed to provide Business continuity and/or Disaster Recovery. Please indicate if these components are installed at multiple physical locations.

Answer: Please see #11

1. For licenses that need to be added to the current PBX and associated equipment to support the new Call Recording, should proposer include pricing for proposer’s team to perform these efforts?

Answer: Yes

1. Will the CM be configured to support encryption, or is it something proposer’s team should include in proposer’s pricing? Is encryption already configured on the CM?

Answer: Please include in pricing. Not in place today.

1. For optionally quoting the call center into proposer’s cloud, can UTP provide the detail on the following:

Answer: Cloud based system is not an option; it is a requirement per the RFP.

* 1. Number of concurrent and named agents? How many remote agents?

Answer: 60 concurrent (all agents are concurrent) and 1 remote

* 1. Number of concurrent and named supervisors/admin?

Answer: 14 concurrent supervisors/admin

* 1. Number of call flows, VDNs, skillsets?

Answer: 60 skills

* 1. Number of announcements and music sources?

Answer: 20 announcements and no music sources

* 1. Automated attendants/menus?

Answer: 3 menus

* 1. Are callers given the option to leave a message based upon wait times or after hours, etc.?

Answer: not currently

* 1. Is the Call Center voice only or include multi-media (email, webchat, etc.)?

Answer: UTP uses email and some web forms - also MS Lync

* 1. Is there an IVR in use today – front end or during call flows? If yes, is this speech enabled?

Answer: no IVR in use today

* 1. Is there any predictive dialing/outbound queuing?

Answer: No predictive dialing or outbound queuing

* 1. Is Callback Assist in use today (ability for caller to maintain their place in queue or schedule a callback)?

Answer: No callback assist in use today

* 1. Are there any reporting capabilities beyond the current CMS?

Answer: UTP currently uses Tavoca for patient reminder calls and texts that we have reporting on

* 1. Are there any screen pop or backend database lookups today? If yes, please describe.

Answer: None

* 1. What softphone is utilized today?

Answer: OneX Agent, OneX Communicator

* 1. What are the basic PC configurations used for agents/supervisors (Windows, Citrix, etc.)?

Answer: Windows

* 1. Any other applications being utilized by the agents or supervisors?

Answer: GECB and Allscripts

* 1. If the Call Center moves to the Cloud, do they want to maintain their current hard phones or go with 100% softphones only? Or a combination of both?

Answer: Cloud based system is not an option; it is a requirement per the RFP.

1. Is the system to be sized for 60+25=85 agents now and additional 40+5 agents within one year?

Answer: Please see #10

1. Should the system be priced also for 60+25=85 agents now and additional 40+5 agents within one year?

Answer: Please see #10

1. What will the duration of the storage of voice recording files (3 months, 6 months, etc.)? Will UTP require the storage and the access to the files to be in online as well as offline mode?

Answer: UTP requirement is 1 year

1. Does UTP require screen recording? If yes, would screen recording be 100% or will it be partial recording?

Answer: UTP is not interested in screen capture at this time.

1. Should proposer submit screen recording costs as an optional item for 60+25=85 agents now and additional 40+5 agents within one year?

Answer: UTP is not interested in screen capture at this time.

1. What will the duration of storage of screen recording files be?

Answer: UTP is not interested in screen capture at this time.

1. Should the system be priced for 100% redundancy and Disaster Recovery?

Answer: Yes

1. Who will provide and bear the cost of the MPLS/IP/Network bandwidth for connectivity between UTP PBX location and vendor cloud location to record the calls?

Answer: UTP

1. Should proposer provide costs for the expansion to all UTP clinics for 200 seats?

Answer: Please see #10

1. Is UTP comfortable with there being two VMs (virtual servers) at each location to collect calls and funnel them to the cloud?

Answer: The VM environment will be located at our data centers, not at the location for the call center or nurse triage

1. With regard to an Avaya AES/Single Step Conference integration for the Avaya AES/CM PBX in place:
   1. Avaya SSC integration requires Avaya licensing on the PBX that includes 1 full DMCC license and 2 TSAPI per recorded device. An additional media processor per device and softphone station per recording channel would be needed. Will/can those be provided by UTP?

Answer: AES not in place today

* 1. Are all phones in scope connected to the AES server?

Answer: Not currently

* 1. Regarding the 2 different locations (Call Center and Nurse Triage), are both of these locations connected to the same AES server(s) or are they connected to separate server(s)?

Answer: None in place today

**Section 5.2 Scope of Work**

1. Please clarify the definition and requirements around “PCI compliant”.

Answer: Please see #17

1. Ability to run (basic and custom) reports in the system – Please provide a list of custom reports that UTP requires.

Answer: UTP uses canned Avaya reports

1. Optional expansion to all UTP clinics – will this be only voice recording?

Answer: Yes

1. Pricing Section 6 of the RFP will be deleted in its entirety and replaced with the following page. Proposal must be submitted with this AMENDED SECTION 6 – PRICING AND DELIVERY SCHEDULE.

Please see next page

AMENDED SECTION 6

PRICING AND DELIVERY SCHEDULE

Initial 2-year term

Implementation Fee $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Included Hardware $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Annual Software License Fee per user

0-100 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

101-200 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

201-300 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

301-400 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Annual Maintenance Fee per user

0-100 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

101-200 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

201-300 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

301-400 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Training $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 3 Renewal Option per user

0-100 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

101-200 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

201-300 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

301-400 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 4 Renewal Option per user

0-100 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

101-200 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

201-300 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

301-400 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year 5 Renewal Option per user

0-100 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

101-200 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

201-300 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

301-400 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Optional Features**

Workforce Management Annual Fee per user

0-100 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

101-200 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

201-300 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

301-400 users $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_